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This guide provides specific information and step-by-step instructions for the Editors of organisational units. The [PMU PURE Researcher Guide](#) covers essential Pure knowledge, including how to search in Pure, import Research outputs, fill in information about an Application, etc. Feel free to use the Researcher guide.

Important

Editors and Reporters are provided with special roles. Check if all these **roles** are related to your Pure profile. If any role is missing, please contact the Research Management at pure@pmu.ac.at. (You can check your roles by clicking on your username and then selecting the *Profile* tab).

As **Editor**, you need the following roles assigned to your profile:

Roles

Editor of Activities, Reporter of Activities, Editor of Press/Media, Reporter of Press/Media, Editor of Curriculum Vitae, Editor of Facilities/Equipment, Reporter of Facilities/Equipment, Reporter of Ethical reviews, Editor of Organisations, Reporter of Organisations, Personal user (staff), Editor of Persons, Reporter of Person, Editor of Prizes, Reporter of Prizes, Editor of Research Output, Reporter of Research Output, Editor of Research Performance Indicators, Editor of Applications, Reporter of Applications, Editor of Awards, Reporter of Awards, Editor of Projects, Reporter of Projects

As **Reporter**, you need the following roles assigned to your profile:

Roles

Reporter of Press/Media, Reporter of Facilities/Equipment, Reporter of Ethical reviews, Reporter of Organisations, Personal user (staff), Reporter of Person, Reporter of Research Output, Reporter of Applications, Reporter of Awards, Reporter of Projects

1. Important for Editors

As an Editor you have the authority the **view, create, edit, and delete** records for your organisational unit. As an Editor you are also **responsible for the completeness of the data** (e.g., Research outputs, Applications, etc.) **for your organisational unit**.

To keep our workflow steps as simple as possible and maintain data quality, **Research Management is responsible for validating and approving Research outputs, Applications, Awards, Projects, and Facility/Equipment** contents.

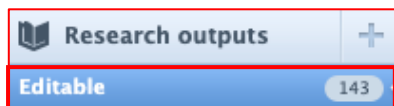
Important

When creating a new Research output, Application, Award, Project, or Facility/Equipment for your organisational unit in Pure, **always set the workflow status to *Entry in Progress or For validation or For approval***, never select Validated or Approved. Once a record has undergone the validation process, don't make any changes to it. If you need modifications (e.g. because of incorrect data), you can write a comment on the record (under the *History and comments* tab). If you make any modifications to a record after the validation process, the Research Management will not take responsibility for the correctness of the data.

2. Check on the content related to your organisational unit(s)

As an Editor, you have the access to the data of your organisational unit(s).

The *Editable* category in content types, such as the content type Research outputs, includes only those research outputs where the organisations unit (of the Editor) the managing organizational unit is:



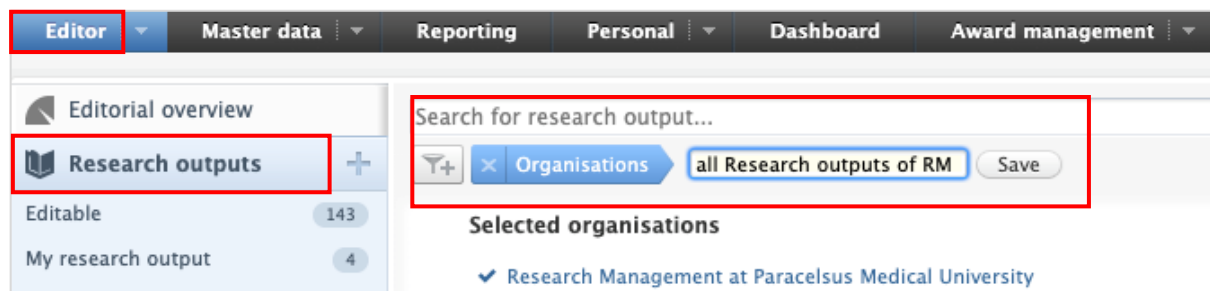
Important

In the Editable category of Research outputs, you will find validated research outputs as well. **Don't make any changes to validated (or in case of other data types to approved) records.** If you need modifications (e.g. because of incorrect data), you can write a **comment** on the record (under the *History and comments* tab) or **contact Research Management at pure@pmu.ac.at**. If you make any modifications to a record after the validation process, the Research Management will not take responsibility for the correctness of the data.

You have three options to reach every Research output of your organisational unit:

1. Option:

1. Go on Editor in the header and select Research outputs.
2. Remove the My content filter.
3. Click on the Add filter icon.
4. Select *Organisations* and fill in the name your organisational unit(s).
5. Add a name to the new filter.
6. Click on the pin icon to save the filter.



Now you can view, filter and download (at the bottom of the window) all Research outputs of your organisational unit(s).

2. Option:

1. Go on Master Data in the header and select Organisational units.
2. Select your organisational unit and click on the name of it.
3. Go on Relations tab.
4. Select Research outputs.

The screenshot shows the 'Research Management at Paracelsus Medical University' interface. The header includes the ID '28023005' and the organisational unit 'Research Management'. The left sidebar has an 'EDIT' section with 'Relations' highlighted in blue. The main content area shows a list of research outputs with 389 results, displayed in short format, sorted by author last name. The first result is titled 'EAN guidance for developing and reporting clinical practice guidelines on rare neurological diseases' by Aleksavska, K., Kobulashvili, T., Costa, J., Zimmermann, G. J., Ritchie, K., Reinhard, C., Vignatelli, L., Fanciulli, A., Damian, M., Pavlakova, L., Burgunder, JM., Rakusa, M., Kovacs, N., Erdogan, F., Linton, L., Copetti, M., Lamperti, C., Servidei, S., Evangelista, T., Ayme, S., & 15 others, 2021, in: JOURNAL OF THE NEUROLOGICAL SCIENCES . 429.

Now you can view and filter all Research outputs of your organisational unit. Please note, that downloading the data from this window is not possible.

3. Option

1. Click on *Reporting* in the header.
2. Select *Blank workspace*.
3. Select *Research outputs*.
4. Click on *Add column* to complete your report. You can create a report yourself and select the data you need.
5. By clicking on *Save* you can save your workspace and use it later
6. By clicking on *Export* you can export the data of the workspace in Excel or JSON format.

The screenshot shows the 'Reporting BETA' interface with an 'Untitled workspace'. The top bar has a 'Save' button. Below the workspace, there is a dropdown menu for 'Research outputs' and a 'Reportable content' section. A table with three rows is visible, containing research output titles. The 'Add column' button is highlighted in red. The 'Export' button is also highlighted in red.

	Title
1	4- and 5-level anterior fusions of the cervical spine
2	A biomechanical rationale for CL-ring osteosynthes
3	Accounting for individual variability in baseline sei

You can use these three abovementioned methods for other content types, such as Activities, Prizes.

Tip

If you are a Researcher as well, you can check on your own records by selecting the *My research output* option:



Research outputs	
Editable	377
My research output	35
Organisations with import candidates	0
Persons with import candidates	0
Research outputs with electronic versions	268

Refer to the [PMU PURE Researcher Guide](#) for options on searching, filtering, viewing, and exporting the various content types.

3. Create the content related to your organisation

As an Editor you have to authority to create contents of your organisation. If you realise that some important records are missing, you can create them yourself.

3.1. Basic data types

You can create following basic content types related to your organisation:

- Research outputs
- Activities
- Events
- Prizes
- Applications, Awards, Projects (Award Management)

For the exact steps of creating this content types, see the *Create your content* section in [PMU PURE Researcher Guide](#).

3.1.1 Addition to Applications, Awards and Projects

Editors have to authority to carry out certain workflow steps for Applications, such as “Submit: funder” and “Reply received from funder”.

If you (or a Researcher from your organisational unit) has **submitted the Application to the funder**, you need to

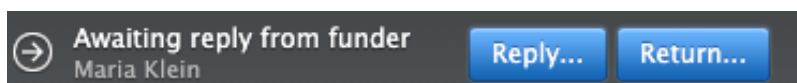
1. Select “*Submitted*” in the workflow at the bottom:



2. Fill in the field “Date submitted”:

If you (or a Researcher from your organisational unit) has **received a reply from a funder**, you also need to:

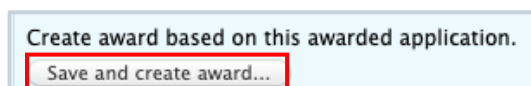
1. Select “*Reply..*” in the workflow at the bottom:



2. Select the type of the reply, and if relevant, fill in the “Award date” field:

In case of a **positive answer from the funder (awarded application)**, please:


1. Contact Research Management at pure@pmu.ac.at
2. An **Award** need to be created. The easiest way to do it is to open the Application and use this shortcut:



3. **Create** a **Project** based on the awarded application by opening the Application and clicking on the “*Save and create project*” button. For the details of Projects see section [Projects](#)).

Related project ?




Related project



Create project based on this application.

4. Click on **Save**.

In summary, in case of a **funded project**, you need to create three data types: an **Application**, an **Award**, and a **Project**. These data types need to be linked to each other:

Award	IDs	Nature of activity	Funder	Awarded	Spend	Funded period	Award date	Applications	Project	Acronym	↓
PMU test for trainings Ebner, P. Award date: 17/02/24 Award: EU > Award			FWF – der Wissenschaftsfonds Österreich	20.00 EUR	0.00 EUR	Mar 2024 – Jun 2024	17/02/24				

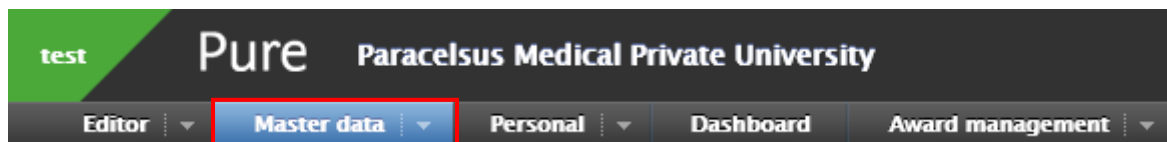
In case of **rejection from the funder**, the process ends, and you don't need to create either an Award or a Project.

3.2. Persons

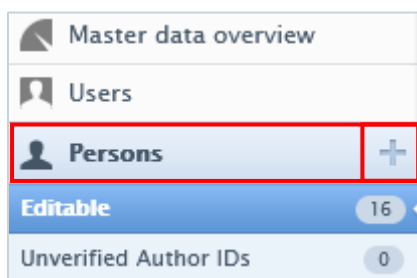
When a new employee starts to work at your organisation, they need to be registered in Pure.

To create a new Person:

1. Click on *Master data* in the header:



2. Select *Persons*, and then click on the  button:



3. In the *Person editor* window, you need to enter the relevant information about the Person:

1. **First name(s) and Last Name:**

Fill in the first name(s) and the last name.

2. **Gender:**

Select the gender from the list.

3. **Organisations:**

Click on the *Add organisational affiliations* to register to internal organisational affiliation(s) of the person. Fill in the **start date** at the institution and register the **e-mail address** of the new employee.

Personal identification ?

First name(s) Last name*

Gender* Date of birth Example: 21/10/2002 Nationality

Name variants

Title

ID

ORCID

Profile photos

Links

Entry date university Example: 21/10/2002 Retirement date Example: 21/10/2002

Research description ?

Profile information

Organisational affiliations ?

Organisations*
 STAFF

Research Management at Paracelsus Medical University Set primary Edit -
 2/11/23 → present
 maria.klein@pmu.ac.at

Start date at institution Example: 21/10/2002 End date at institution Example: 21/10/2002 FTE (as of today) **0.00**

4. Click on Save.

Important

In the next step, please **notify the Research Management** by writing a short comment on the record or via e-mail (pure@pmu.ac.at) with a **request to create a user** for the Person.

Here is an example of writing a Comment:

Comments

There are no comments for this content

Write a comment about the content

Please create a user for this Person.

Send this comment as a message to:

- All contributors to this content
 - Mária Klein
- All editors of this content
 - Mária Klein
- All administrators of this content
 - Dorothea Kölblinger
 - Lena Stöllinger
 - Mária Klein
 - Patricia Ebner

Once, the user account has been created, the new employee receives their Pure username and password via **email**. After that, the **Person can edit their profile**, for example, register education/qualification data, positions outside of the institution, etc.

Tip

To directly check the **active** versus **not active Persons** of your organisational unit, please refer to “Persons” tab:

Pure Paracelsus Medical University

ID: 28023005

Research Management at Paracelsus Medical University
Organisational unit: Research Management

Editor: Master data

Master data overview

Users

Persons

Organisational units

Editable 1

Research performance indicators

External persons

EDIT

- Metadata
- Performance Indicators
- Translation
- Persons

OVERVIEW

- Relations
- Fingerprints
- Display

Honorary staff

All 0 Past 0 Active 0 Future 0

Add persons and their content

Staff

All 27 Past 4 Active 23 Future 0

Patricia Ebner
21/07/22 → present
Research associate, Researcher

To update data (such as the end date at the organisational unit) to a Person's profile:


1. Search for the Person.
2. Modify their data in the Editor window. For example, fill in the End date at the organisation unit:

Affiliation

Research Management at Paracelsus Medical University
Organisational unit: Research Management


Staff type: Academic ▼ Employed as: Researcher ▼

Start date *: 03/07/2023  Example: 21/10/2002

End date  Example: +12 is 12 months later

FTE:

Contract type: No value ▼

Job title: No value ▼  Job description:

Important

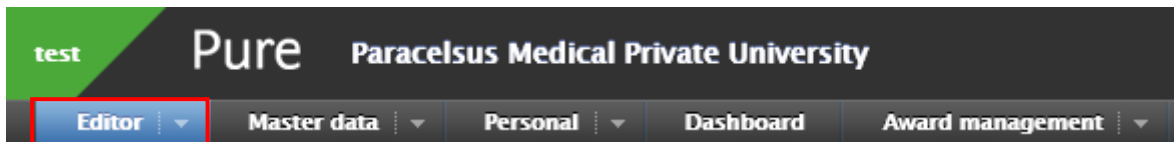
To change the **e-mail address of a Person required for Pure login** or to **add another internal organisation unit affiliation** to the Person 's profile, please contact **Research Management** at pure@pmu.ac.at.


3.3. Facilities/Equipment

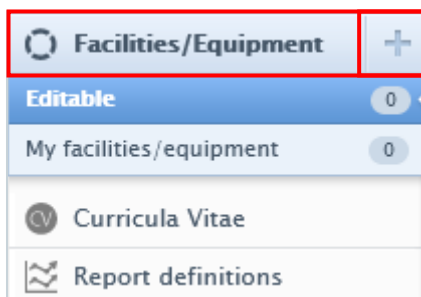
Editors have the authority to register Facilities, which are used for research purposes, for example laboratories, or fill in information about Equipment of the Facilities, such as fMRI machine.

To create a Facility/Equipment:

1. Click on *Editor* in the header:



2. Select *Facilities/Equipment*, and then click on the  button:



3. Select either facility or equipment.
4. In the Facility/Equipment window, you need to enter the relevant information about the facility or equipment. The required fields are marked with a red star and filling them in is mandatory. Filling in the other fields is optional.

1. **Type:**
Select the type of the record.
2. **Title:**
Fill in the title of the facility/equipment,

Type ⓘ

Type
Facility ▼

Description ⓘ

Title *
Laboratory

Description

3. Persons and organisations:

Click on *Add organisation unit* button to register the associated organisational unit.

4. Managing organisational unit:

Select the internal organisational unit, which is responsible for managing the Facility or Equipment:

Persons and organisations ⓘ

Persons and organisations ⓘ + person

No persons or organisational units associated

Add person... Add organisational unit...

Facility/equipment managed by ⓘ

Managing organisational unit * + person

5. Click on Save:

Status: For approval ▼ Save

In the next step, the record will be approved by the Research Management.

4. Workflows

4.1. Workflows of basic data types

Editors have the **same authority in the workflow processes as Researchers, except for Applications** (see chapter [4.1.3. Workflows of Applications](#)). This means that the workflow steps marked with Researcher (see in the [PMU PURE Researcher Guide](#)) can also be done by Editors (except for Applications).

For example, in Research outputs an Editor can be associated with the following two workflow steps:

1. Entry in progress.
2. For validation.

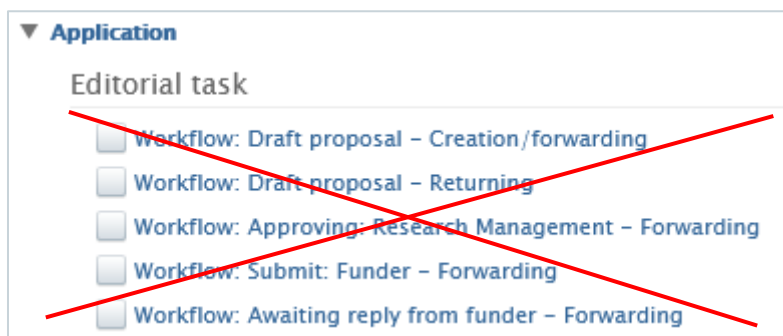
The 3. Step (validated) will be done by the Research Management, regardless of whether the creator is a Researcher or an Editor.

To keep our workflow steps as simple as possible and maintain data quality, **Research Management is responsible for validating and approving** Research outputs, Applications, Awards, and Projects. As a result, we have deactivated some notifications assigned to the Editors' profiles:

Important

Please **do not change any notification settings for emails, notifications, and tasks connected to the workflows (in the Editorial tasks category) of Research Output, Application, Award, Project, Facility/Equipment, and Person.**

Here is an example, please **don't change this kind of notifications**:

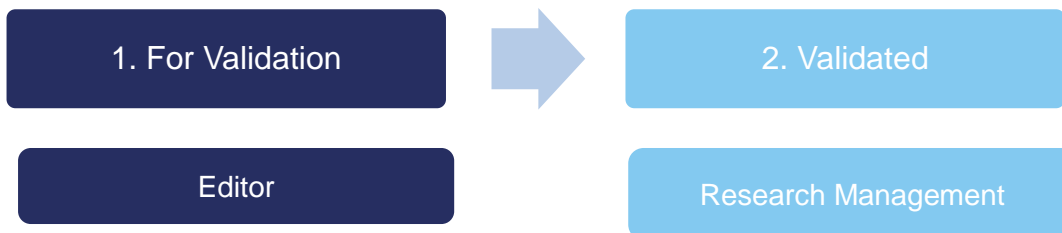


4.2. Workflows of Facilities/Equipment

The content type Facilities/Equipment has a **2-step** workflow.

1. *For Validation*: The Facility/Equipment is awaiting validation by the Research Management.
2. *Validated*: The Facility/Equipment has been validated by the Research Management.

Once the Facility/Equipment record has undergone the validation process, the Editor cannot edit anything, but read the record.



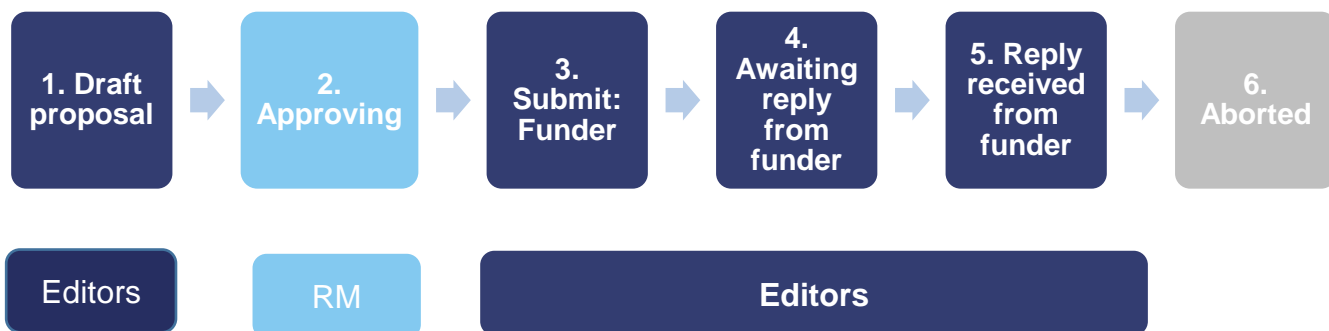
4.3. Workflows of Applications

Editors have to authority to carry out certain workflow steps (marked dark blue in the diagram) for Applications. (For Researchers, it is not possible to carry out those workflows)

The content type Applications has a **6-step** workflow:

1. Draft proposal: The Application entry still is in progress and being worked on.
2. Approving: The Application is awaiting internal approval from the Research Management.
3. Submit: funder: The Application is ready to be submitted to the Funder. **Please fill in the field *Date submitted in the editor window*.**
4. Awaiting reply from funder: The Application has been submitted and you are waiting for the Funder reply-
5. Reply received from funder: The Funder has replied. **Please select the type of reply in the editor window.** In most cases this will be the last workflow step, and the Application is either successful or not.
6. Aborted: The Application process has been stopped (Aborted) somewhere in the process.

Important
 Click on the button **“Send to internal approval”** at the bottom to push the workflow from draft proposal to approving. (If you only click on “Save”, you will save the record, but you will not push it to the next step in the workflow).



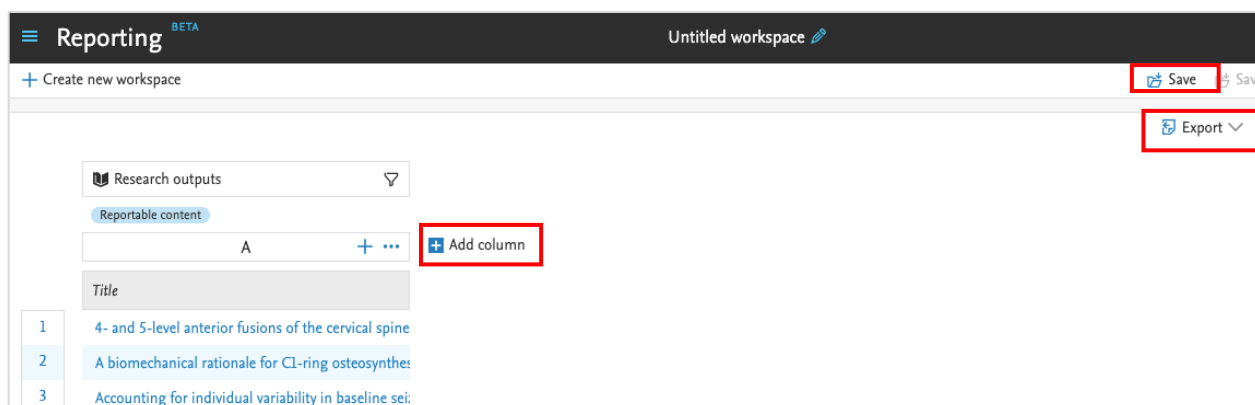
Important
 Please **contact the Research Management** (pure@pmu.ac.at) if your Application has been **awarded by the funder**.

5. Reporting

Pure enables users with special roles to report data directly. The Research Management has begun to create useful templates for reporting goals, which will be available later. For a comprehensive understanding of how reporting works and additional details, you'll find more information in the **training sessions**.

Please find here an example how to create a report yourself in Pure:

1. Click on *Reporting* in the header.
2. Click on *Blank workspace* (blue colour)
3. Select *Research outputs*.
4. Click on *Add column* to complete your report. You can use filter that restrict which rows are shown, for example Type of Research outputs. You can create a report yourself and select the data you need.
5. By clicking on *Save* you can save your workspace and use it later
6. By clicking on *Export* you can export the data of the workspace in Excel or JSON format.



Important

Exporting a **list of the Research outputs with Impact Factors and Score Points** is not directly possible for Editors or Researcher from Pure. If you need such a list, please get in touch with Research Management at pure@pmu.ac.at.

6. FAQ

Will I get a PURE notification/e-mail once a Research output has been validated?

No, you don't get a notification or e-mail once a research output has been validated. It is not possible to change these kind of notifications. The label of the record always shows the current workflow status of the record. For example, once a publication has been validated, the workflow state is *Validated*.

Will I get a PURE notification once Application has been approved by Research Management?

Yes, you will get a notification and e-mail once an Application has been approved by Research Management in Pure.

I have an Editor role in Pure, but I am a Researcher as well. Will I have two profiles in Pure?

You will only need one profile even if you are an Editor and a Researcher. As a Researcher you will find your own content under the My... category. For example, in case of Research outputs it will be under *My Research outputs*.

I don't see my Personal workspace (where I can change my name variants, ORCID, etc.) in Pure. What should I do?

First, check if the black tick box (*Always show the personal workspace*) has been filled in. You will find this option under your user profile. It is important, that you need to click on the word *Personal*, but not on the triangle next to it to open the *Personal workspace*.

My Application has been awarded by the funder. What is the next step in Pure?

In this case, you need to inform the Research Management. The easiest way to do this is to write a comment on the Application. In the next step, please select *Awarded* in the Funder status field, and set the workflow status to *Reply received from a funder*. Now you can create an Award and a Project based on the Application by using the shortcuts *Create award/project based on this awarded application*. Sometimes the applied and the awarded amount can be different. You can register the awarded amount in the *Funding field* of the award.

My Award/Project has been approved in Pure, but I need to make some changes on it. How can I do that?

If an Award or Project has been approved by Research Management, you cannot change anything on it yourself. Write a comment with the important changes on the Award or Project. Please note that you need to select the Admins - Patricia Ebner, Lena Stöllinger, and Maria Klein - before saving the comment. You can also contact Research Management at pure@pmu.ac.at – they have the authority to make changes on approved records.

I need to create a Project with financial data, but I can't find the financial data fields. What should I do?

It is not possible to add financial data to Projects. If you want to create a funded Project in Pure, you will need to create an Application and an Award as well. You don't need to create a new Award and Application from scratch, you can use the shortcut *Create application based on this project*, or *Create awards based on this project*. By doing so you don't need to fill in every field of the award manually.

Our organisational unit has more departments. Is it possible to divide my organisational unit into departments in Pure?

The names of the organisational units in Pure are based on the official list from the leadership. It is not possible to change anything in the names of the organisational units, including dividing them into departments.

Do I need to update my publication data in Pure?

The update of publication data imported from online sources occurs automatically through interfaces.

Will the Research Management check on the funding details during the approval process of Applications/Awards?

The Research Management verifies the overall adequacy of the information, they don't delve into the specifics, such as scrutinising funding details. The Researcher/Editor is responsible for the authenticity of the data.

I am a researcher, and sometimes I am not sure which kind of publication data I should add to my Pure profile.

Basically, it is important to have every published article, book, book chapter, event, and funded project in Pure. This type of data is not only important for researchers but also for the organizational units. It is your decision whether you want to register your talks, peer-review work, etc., in Pure or not

I found a Researcher who no longer works in my organisational unit but in another internal organisational unit. How do I register this information in Pure?

You can register the end date by clicking on 'Edit' next to the name of the organisational unit. The Researcher needs to get in touch with the Editor of the current organisational unit or with Research Management (pure@pmu.ac.at) and ask them to add their profile to the 'Persons' of the unit.